

OFFICE OF PERSONNEL MANAGEMENT
Interagency Advisory Group
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Minutes of the IAG Committee On
Performance Appraisal

April 13, 1979

Ms. Mary Sugar, Chairperson of the Performance Appraisal Task Force, opened the meeting by saying that OPM was planning to hold a series of symposia featuring speakers on different aspects of performance appraisal. She introduced Ms. Kathleen Colbourn of the Training Leadership Division, who handed out a questionnaire asking for agency suggestions for speakers and topics. It was emphasized that the symposia should be practical rather than theoretical and should use speakers who have had operating experience.

Ms. Sugar announced that a special session of the course in performance appraisal and standards setting would be held on May 4 for IAG committee members (principals and alternates). Agencies were invited to submit nomination forms marked "IAG member" through regular channels.

Dr. James Caplan of OPM's internal Office of Personnel, assisted by Mr. Michael Barrett of the Compensation Group, discussed the revised production standards recently developed for OPM's retirement claims examiners. The standards, currently being validated, are designed to provide equitable treatment of employees through incentives for handling the more complex cases. The underlying research had indicated that units of work previously treated alike for production measurement purposes were not always truly comparable. As useful byproducts of the new standards, the assignment and orderly processing of cases are facilitated and management is provided with information on what types of cases are causing processing problems. Performance standards will be established based in part on the production standards.

Mr. Bruce Tomaso of IRS discussed the computerized rating system in use at IRS Service Centers. The system is based on peer group comparisons, floating standards, and forced distributions and was designed primarily to identify the top performers for competitive promotion purposes. The system will have to be changed to meet the requirements for appraisal of current job performance in relation to established standards communicated in advance.

Mr. Ken Lawrence of OPM's Workforce Effectiveness and Development Group announced that Part II of the handbook on Suggestions on Implementing Performance Appraisal Systems will soon be issued following a limited period for review and comment by selected agencies. Part II will focus on "how to do it" while Part I, issued in February, was primarily concerned with "what to do."

The next IAG committee meeting will be held on April 24, 1979.

Minutes of the IAG Committee on Performance Appraisal

April 24, 1979

Ms. Mary Sugar, Chairperson of the Performance Appraisal Task Force, announced that two special FPM Bulletins will soon be issued. One is a discussion of the state of the art of performance appraisal, and the other is a checklist for appraisal system statutory and regulatory compliance. Copies of these bulletins will be mailed to all committee members.

It was also announced that the course for IAG members previously scheduled for May 4 will be rescheduled for a later date.

Mr. Bill Stacy of the Air Force Office of Civilian Personnel Operations discussed Air Force's performance appraisal research project, which began approximately two years ago. Field testing is underway, and Air Force is aiming at implementation in 1980.

Ms. Sugar distributed a draft statement clarifying the options available to an agency when employee performance falls below the minimum standard for a critical element of the position. The statement was discussed at length among those in attendance.